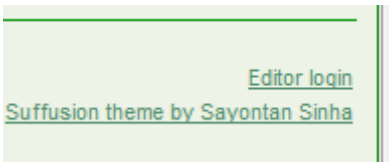
User Manual

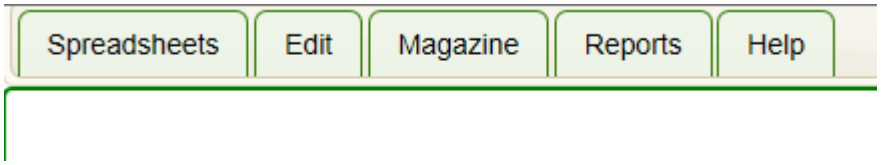
1. Logging In

To use the membership system, you need to go to the membership administration page http://srp.org.uk/membership-administration/ . If you want to try things out, then there is a copy of the system at http://sandbox.srp.org.uk/membership-administration/ . This sandbox site works with a copy of the database so it is safe to do whatever you like: it will not affect the real membership database at all.

To use either of these sites, you need to log in. If you are not already logged in, when you go to the page, you will get a message “Please login to use this page”. To login, click **OK**, scroll down to the bottom of the page and in the right hand corner you will see a small button **Editor login**:



Click this and enter your username and password. After a pause you should see the page with a row of tabs and an editing area, like this:



The **Spreadsheets** tab is for processing branch spreadsheets.

The **Edit** tab is for editing data online, and is used for updating information about members, affiliated organisations, honorary positions and other roles.

The **Magazine** tab is for updating magazine subscriptions.

The **Gift Aid** tab produces gift aid schedules for submission to HMRC.

The **Reports** tab allows you to generate various reports from the database, including spreadsheets for making gift aid claims, summary statistics and the membership list.

Each of these tabs is described in one of the following sections.

The **Help** tab contains links to this User Manuals.

2. Spreadsheets

At the beginning of each year

Produce a spreadsheet for each branch.

1. In **Make a spreadsheet for** <year> **for Branch** <branch> choose the current year (for example **2014-2015** and branch **(all)** and click **Get Spreadsheet**
2. Save the spreadsheet in, for example, **toBranches**
3. Open **MakeSpreadsheets.xlsm**
4. Make sure that **Look for csv files in** is set to where you saved the spreadsheet in step 2 (for example **toBranches**) and click **Make branch spreadsheets** and select the csv file you have just downloaded. The resulting spreadsheets will be stored in the folder you specified in **Save xls files in**.

When you receive a spreadsheet from a branch

Load it into the database, produce an updated spreadsheet and send it back to the branch.

If the spreadsheet contains new members, consider whether these are completely new or are existing or previous members who have rejoined or changed branch. The system will try to find such cases (see section 3) but if you know that a member is already in the database, it is more reliable to insert their membership number directly into the spreadsheet.

1. Save the spreadsheet as a csv file. (This loses all the formatting, so you might want to save the xls version too, for human readability.)
2. In the **Load <file> Browse** control, click **Browse** and find the csv file you saved in step 1 and click **Open**. This will do one of two things:
    a. Display a list of new members that the system thinks may match existing members.
    b. Display the spreadsheet, highlighting the changes that will be made as described in the section on Highlighting.

       If there are no errors, there will be a message **Ready to save**. If there are errors, the message will be **There are errors in the spreadsheet**.
3. If the system displays a list of matches for new members, check whether each entry really does match the suggested existing person. If so tick the entry, otherwise untick it. When you click **OK** the spreadsheet will be displayed as in 2.b and you can go then go to step 4 or 6.

   For a member to match, they must have a surname that sounds like the new one, a similar forename, and either a similar email address or a similar postal address. Matches are displayed in order of closeness to the new member. The fields that are different from those of the new member are highlighted. When a match is ticked, the fields in the new member that differ from the ticked match are also highlighted.

   In addition, matches are classified according to the membership status as plausible (green), possible (blue) and wrong (red). A match is always classified as wrong if the member already has a subscription to this branch. (This is always an error, but it can happen if a branch erroneously submits data based on an old spreadsheet where they have not included the newly-allocated membership numbers. In that case only, it is right to tick the matches.)

   A match is ticked by default if it is the only match found, it is considered close enough to be plausible, and it is not classified as red.

Associate members

If the new member is an associate member, then the highlighted fields in each match are shown in bold. This is because the existing member's details take precedence over the new details (since only a main branch can update a member's personal details).

If the spreadsheet specifies a main branch (for example "A-OXF") the classification is green if the existing member is indeed a member of that branch, and red if they are a current member of a different branch, otherwise yellow. Note that if you tick a red match, there will be an error shown when the spreadsheet displays, because of the mismatch between the specified and actual branch. You can clear this error by deleting the specified branch.

If no main branch is specified, the classification is yellow.

Full members

If the new member is a full member, then the highlighted fields in each match are shown in grey strikethrough, because they will be overwritten by the new information.

The match is classified as green if the member has an associate subscription at another branch and specifies this branch as the main branch. It is yellow if the member has no current subscription or an associate subscription that does not specify a main branch. It is red if the new member has an associate subscription that specifies a different main branch. This last case may simply mean that the associate branch had the wrong information, and ticking the match will not cause an error.

4. If the message is **Ready to save**, then you can, if you want, check the spreadsheet and make any changes you think necessary. (If you do make any changes, then you have a chance to check the spreadsheet before saving.) To help you check, the spreadsheet is highlighted to show the precise changes that will be made, as described in the section on **Highlighting**. In addition, the row currently being worked on is highlighted in pale yellow.
   When you are satisfied that the spreadsheet is correct, click **Save**. Once the sheet has been saved you will get a message offering to make a new spreadsheet.
   a. Leave the checkbox ticked and click **OK**.
   b. Save the new spreadsheet
   c. Open **MakeSpreadsheets.xlsm** and convert the file to xls to send to the branch.
   d. You may also want to make a note of the subscriptions and donations due from the branch, which are shown at the top of the spreadsheet.
5. If the message asks you to **confirm changes**, it means that loading the spreadsheet would change or remove one or more existing subscriptions. The potential changes are highlighted in orange with a grey background, and the current values are shown underneath. A new column headed **?** contains a checkbox for each row: in rows that need confirmation the checkbox is highlighted with an orange border.
   If you tick the box the change will be carried out; if you leave it unticked, the change will be ignored. In either case, you have the opportunity to check the spreadsheet before saving it.
6. If there are **errors** and you know what the right values should be, you can correct the errors, recheck the spreadsheet, and then click **Save**, as in step 3. Otherwise you may have to go back to the branch to find what the correct value should be – for example if a postcode is invalid. You can abandon the spreadsheet at any time before you've saved it, just by doing something else (eg loading another spreadsheet) or simply closing the browser or going to a different page.

Highlighting

When loading a spreadsheet or editing on-line, each item is formatted to show what is going to happen:

grey, normal text	an unchanged item
black, normal text	an item being added to the database
black, bold	an **item being changed** in the database the ~~old value~~ is shown struck through underneath
black border	a checkbox whose value is being changed the old value is shown as 1 (ticked) or 0(unticked) below
grey background	an item being ignored the old value is shown in grey underneath
blue italic	an *item whose value is calculated by the system*
strikethough	an ~~item that is going to be deleted~~
orange, grey background	an item that is being ignored because it needs confirmation
orange border	a checkbox that is being ignored because it needs confirmation (and also the confirmation checkbox itself if it has not been ticked).
red	an item in error
pale yellow background	the row currently being worked on

General Notes

Spreadsheet processing only allows personal details to be changed by the main branch, not an associate branch. It is the main branch that is responsible for the SRP subscription and therefore it is responsible for the definitive information about a person. A corollary of this is that a branch cannot change the personal details of someone who does not have a current subscription. So changes of personal details are ignored if the membership status is A or N (or, of course, X). Of course any branch can always change the branch role of a member since that is a matter for the branch.

Known Deficiencies

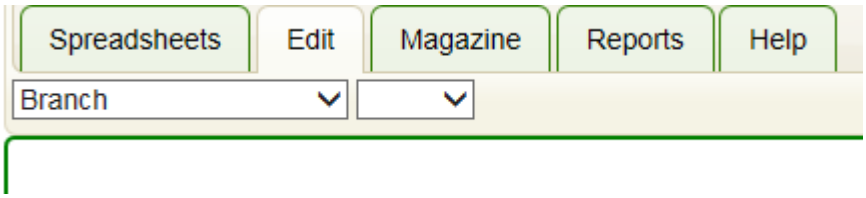
The spreadsheet highlighting is not dynamic: when you change an item, the highlighting does not change until you click **Check Spreadsheet**.

The matching process probably needs tuning. At the moment it shows at least one match if it can find any matches at all, even if it is a long way from the new member. This is an attempt to avoid missing possible matches, but is probably annoying.

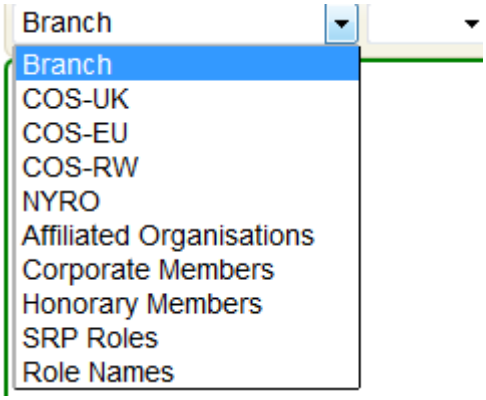
3. Edit

Introduction

The edit tab is for updating the membership records directly, without using spreadsheets. Initially it looks like this



Click the drop down box on the left to get a list of what you can edit:

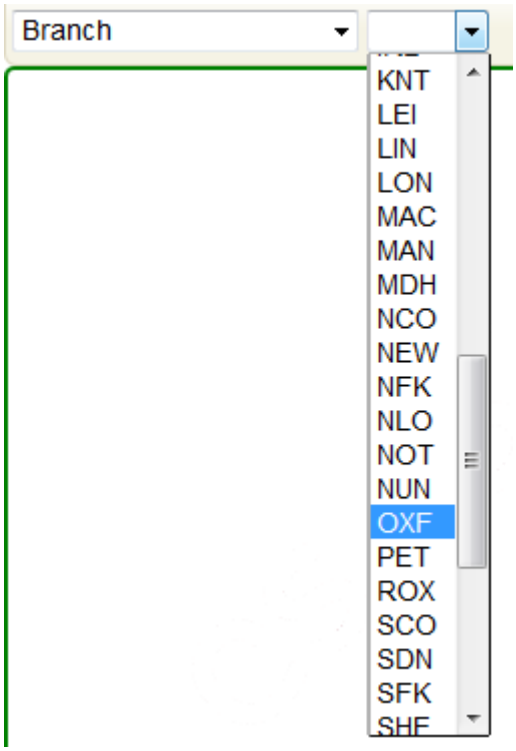


There may be fewer items in this list, depending on what you personally are able to edit. All editing behaves in roughly the same way, although there are small differences between the different choices. Editing a branch typical, so I will describe that process, and then in later subsections describe only the differences for other choices.

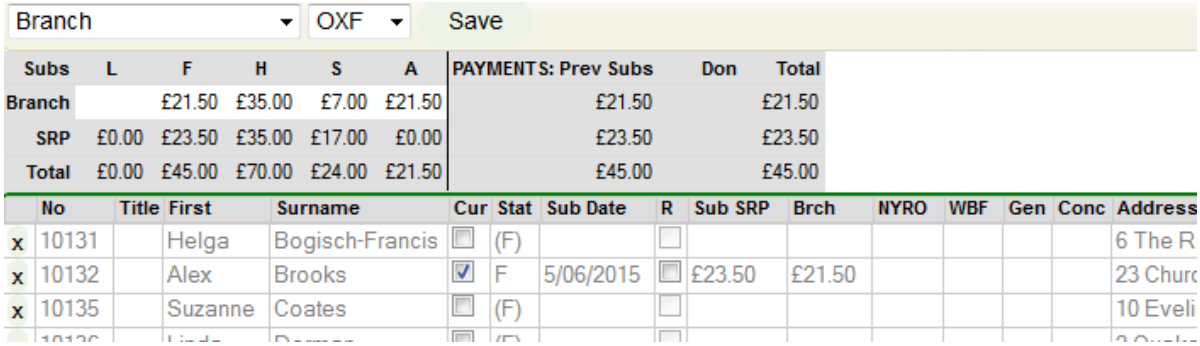
Editing a Branch

General

Click the drop down box on the right to get a list of branches you can edit.



When you click the selected branch, the screen will contain something like this:


Branch
OXF
Save
Subs L F H S A
Branch £21.50 £35.00 £7.00 £21.50
SRP £0.00 £23.50 £35.00 £17.00 £0.00
Total £0.00 £45.00 £70.00 £24.00 £21.50
PAYMENTS: Prev Subs Don Total
£21.50 £21.50
£23.50 £23.50
£45.00 £45.00
No Title First Surname Cur Stat Sub Date R Sub SRP Brch NYRO WBF Gen Conc Address
x 10131 Helga Bogisch-Francis (F) 6 The R
x 10132 Alex Brooks F 5/06/2015 £23.50 £21.50 23 Churc
x 10135 Suzanne Coates (F) 10 Eveli

Header

At the top there are two tables. The first shows the current subscription rates for the different classes of membership. The second shows any payments that have been made (or should have been made) this year so far.

The subscriptions table shows the standard subscriptions for your branch, the subscriptions to Central SRP and the total payable by each class of member. The grey boxes are calculated automatically. The white boxes, containing the branch element of the subscriptions, are blank when you first start a new membership year. You can leave them blank if you wish. If you fill them in then they will be saved and used to set the initial branch subscription for each member (see below).

The second table shows the subscriptions and donations recorded so far. In the example above, just one member has renewed so the amounts are a single subscription divided into the branch and SRP elements. The donations column is empty since the member did not make any donations.

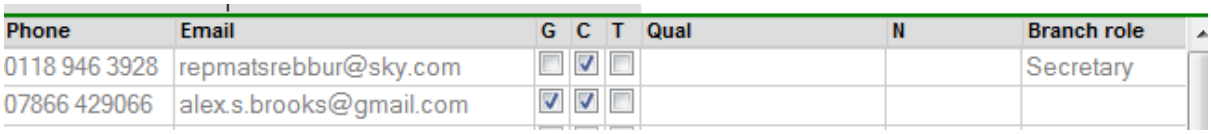
Spreadsheet

Within the green frame, there is a table that looks much like a spreadsheet. If it overflows the frame, there are scroll bars within the frame so you can scroll it horizontally and vertically. You can also resize any column by hovering the mouse in the header row between columns until it changes to a double arrow and holding down the left button (or touching the screen) shows a double vertical bar,

	No	Title	First	Surname	Cu
x	10131		Helga	Bogisch-Francis	☑
x	10132		Alex	Brooks	☐

and then dragging it left or right.

The table shows current and past members of the branch. In the first row, Helga Bogish-Francis has not yet re-joined so her membership status last year is shown in parentheses. In the second row, Alex Brooks has already re-joined this year so the **Cur** box is ticked, her membership status F, the subscription date and her SRP and branch subscriptions are shown. The **R** box is not ticked because she paid a full, not reduced, subscription. She has not made any donations, so the columns for NYRO, WBF. general and concerto donations are blank. The remaining columns list all her personal details and branch roles, if any. The details are the same as on the branch spreadsheet, except that the Reduced Subscription, Gift Aid and Consort/Teacher boxes are replaced by checkboxes R(Reduced Subscription), G (Gift Aid), C(Consort) and T(Teacher):



Phone	Email	G	C	T	Qual	N	Branch role
0118 946 3928	repmatsrebbur@sky.com	☐	☑	☐			Secretary
07866 429066	alex.s.brooks@gmail.com	☑	☑	☐			

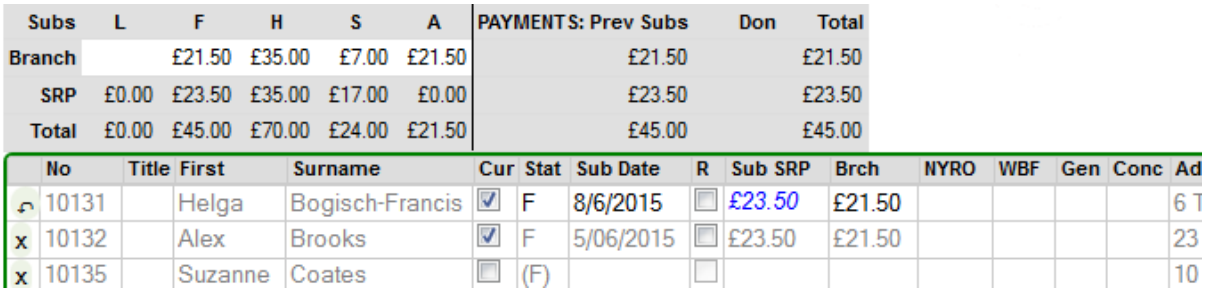
The text in the table is almost all grey: this indicates that it is unchanged from the values saved in the database (of course, since we haven't done anything yet). As you edit, you will see other colours as described in the section on **Highlighting**.

To make changes to the database, you edit the table and then click **Save**. While you are editing the table, no changes are made in the database, so don't worry about making mistakes – you can undo them or simply give up and start again.

When you edit the table, the row currently being worked on is highlighted in pale yellow.

To Renew a Subscription

All you have to do to renew a subscription is to click the **Cur** box.



Subs	L	F	H	S	A	PAYMENTS: Prev Subs	Don	Total
Branch		£21.50	£35.00	£7.00	£21.50	£21.50		£21.50
SRP	£0.00	£23.50	£35.00	£17.00	£0.00	£23.50		£23.50
Total	£0.00	£45.00	£70.00	£24.00	£21.50	£45.00		£45.00

	No	Title	First	Surname	Cur	Stat	Sub Date	R	Sub SRP	Brch	NYRO	WBF	Gen	Conc	Ad
↶	10131		Helga	Bogisch-Francis	☑	F	8/6/2015	☐	£23.50	£21.50					6 T
x	10132		Alex	Brooks	☑	F	5/06/2015	☐	£23.50	£21.50					23
x	10135		Suzanne	Coates	☐	(F)		☐							10

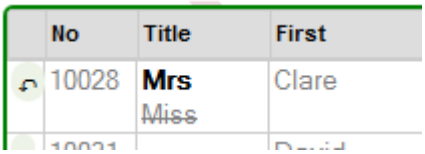
By default, the membership status is set to what it was last year. However, you can change it just by typing a different status into the **Stat** field. As on the spreadsheet, the allowed statuses are L, LH, F, H, h, S and A. The date of the subscription is set to today's date, but again you can change that if it was received some time ago. The Central SRP subscription is entered automatically, and shown in blue to indicate that it is system-generated and can't be changed. In this example the branch element of the subscription is also entered automatically, based on the figure in the table at the top. However, you are free to change this figure if the member paid a non-standard subscription for some reason. If the standard branch subscriptions have not been entered, then the member's branch subscription is initially blank. You can enter a figure by hand if you wish, but it is entirely at the discretion of the branch and not obligatory.

If the member gave donations, enter them in the appropriate boxes.

Whenever you make a change to a line in the table, the **x** at the beginning of the line changes to the backward arrow ↶ that you see in the first line. Clicking that allows you to undo all the changes you have made to the line.

To Change a Person's Details

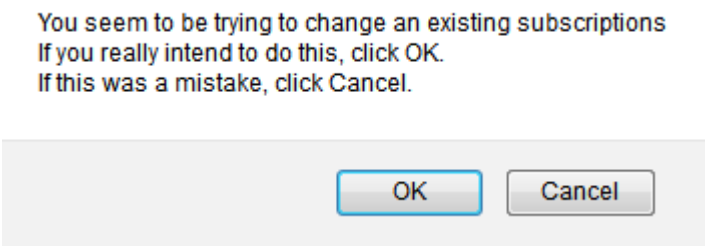
Simply type the new details in the relevant field, or click the relevant checkbox, New text will appear in bold and the old value is shown struck through below.



When entering telephone numbers, you can give one or two numbers. If you enter two, separate them by a comma. Each number can contain spaces if you wish. UK numbers should start with zero; overseas numbers should start with "+" and the country code.

You can only change details such as name or address if the person has a current non-associate subscription to your branch. You can of course change the branch role of anyone, since that is a matter for your branch alone. If a person has more than one role, separate them by commas.

If you try to change or remove an existing subscription, you will be prompted to confirm the change:


You seem to be trying to change an existing subscriptions
If you really intend to do this, click OK.
If this was a mistake, click Cancel.
OK
Cancel

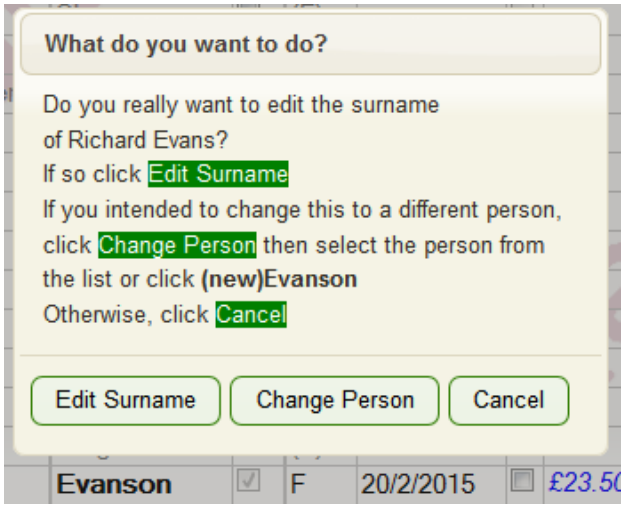
To Add a New Member

Go to the bottom of the table, where you will see an empty line with a **+** on the left. Start typing the person's surname into the **Surname** box. After you have typed a few letters you will see a list of people in the database whose names start with what you have typed.

(new) eva
10490 Angela Eva (CHG) Acorn Rise Townsend Randwick Stroud, Glos
12034 Audrey Evans (PET) 104 Lincoln Road Deeping Gate Peterborough
11509 Chris Evans (SDN) 177 Vale Road Seaford East Sussex
10725 David Evans (DEV) 45 Burnards Field Road Colyton Devon
11207 John Evans (MAN) 40 Catterick Drive Little Lever Bolton
12113 Martin Evans (NEW) 35 Queens Road Jesmond Newcastle upon Tyne
11510 Pat Evans (SDN) 177 Vale Road Seaford East Sussex
10649 Richard Evans (BNH) 11 The Furrows Luton
eva

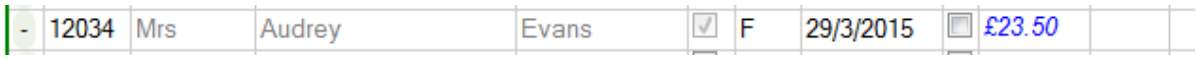
Each person's branch is shown, in parentheses if they don't have a current subscription. If the new member is one of them, click that name. If not, click the (new) entry at the top of the list. In either case, a new line is added to the table with the surname you have chosen. If you clicked an existing person, all their details are filled in. If not, just the surname is filled in, In either case the person is made a current full member, although again you can of course set their membership status to something different. If it is a completely new person, then fill in the rest of their details. If it is an existing person, then you can change their details if the existing ones aren't correct.

If you need to change the surname of a newly added person, then type the changes into the surname field, ignoring the list of names that will be offered, and then move on to the next field (or press the tab key). You will be prompted to check that this is really what you intend to do.



Choose **Edit Surname** if this is really what you wanted.

After adding a person, there is a – button at the left of the new row.

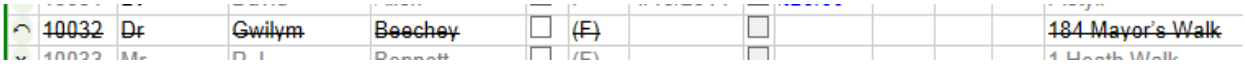


Clicking this removes the person again.

To Remove a Member

If a person simply fails to renew, **do not do anything at all**. Their details should remain on the database in case they rejoin or join another branch.

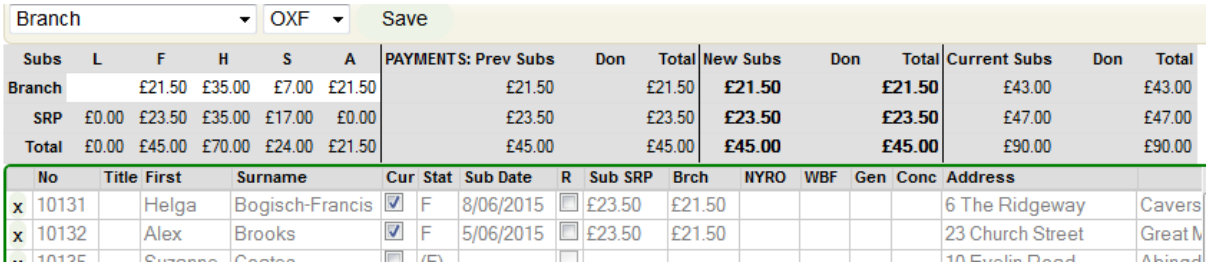
However, if a person dies, then click the **x** on the left of the row. This will prompt to check that you really mean this, and if you go ahead show the person with a strikethrough.



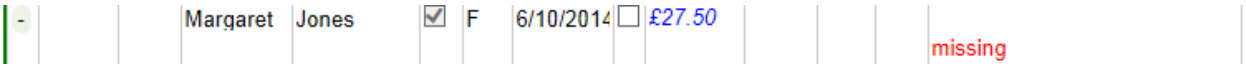
As with all other changes, you can of course undo this.

To Save Changes

Once you have made all the changes, click **Save**. Normally, this will show you the new state of the membership and summarise the old and new subscriptions and donations at the top of the table.


Branch
OXF
Save
Subs L F H S A PAYMENTS: Prev Subs Don Total New Subs Don Total Current Subs Don Total
Branch £21.50 £35.00 £7.00 £21.50 £21.50 £21.50 £21.50 £21.50 £43.00 £43.00
SRP £0.00 £23.50 £35.00 £17.00 £0.00 £23.50 £23.50 £23.50 £23.50 £47.00 £47.00
Total £0.00 £45.00 £70.00 £24.00 £21.50 £45.00 £45.00 £45.00 £45.00 £90.00 £90.00
No Title First Surname Cur Stat Sub Date R Sub SRP Brch NYRO WBF Gen Conc Address
x 10131 Helga Bogisch-Francis F 8/06/2015 £23.50 £21.50 6 The Ridgeway Cavers
x 10132 Alex Brooks F 5/06/2015 £23.50 £21.50 23 Church Street Great M

However, it may report errors, for example if you have omitted a required field or typed an invalid membership status. In that case, click OK and find the errors, which will be highlighted in red



Here, for example, the user forgot to type an address for the new member. Correct the errors and click **Save** again.

Known Deficiencies

At the moment, you can try to change the personal details of associate members. However these changes will be ignored since only the main branch can change a person's details.

Editing COS membership

Editing COS membership is exactly like editing a branch, except that there is of course no branch subscription and no branch role.

Editing Affiliated Organisations and Corporate Members

This is similar to editing COS members.

		Organisation	Email	Web	Cur	Sub SRP	No	Title	First	Surname	Address
x	10096	Aberdeen Chamber Recorder Orchestra	Recorder_1@Hotmail.com		☐		10164		Ed	Friday	22 Yule Square

The differences are:

1. There are fields for organisation name, email and website address
2. There is no membership status, date of subscription or donation information.
3. The personal details shown are for the contact person for the organisation. This person may be a member in their own right, or not, but in either case the person has a different membership number from the organisation. Both numbers are shown – the organisation's on the left and the person's in the No column just before the person's title and name. Not all person fields are shown – just the address, phone and email (which may or may not be different from that of the organisation).

To Renew a Subscription

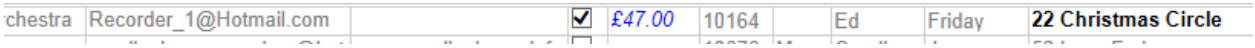
Simply click the **Cur** box for the organisation.

To Change the Organisation's Details

Edit the field you want to change. You can only do this when the organisation has a current subscription.

To Change the Contact Person's Details

If the organisation has the same contact person but that person has, for example, changed their address then just type the changes in. The changed fields will be shown; note that the person's number is, of course, not changed. If you change the surname then you will be prompted to confirm this as with a new COS member.

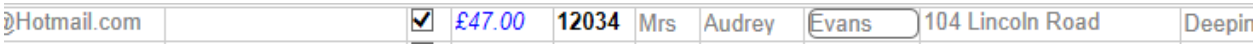


chestra	Recorder_1@Hotmail.com	☑	£47.00	10164		Ed	Friday	**22 Christmas Circle**

Note that you can't change fields such as gift aid or consort playing that are not shown – if these have changed they must be edited by the person's main branch.

To Change the Contact Person

If the organisation has changed to a different contact person, then clear the surname field and start typing the new contact's surname. After a few letters, you will see a list of possible matches. If the new contact person is one of them, click that name, which will fill in that person's details.



@Hotmail.com	☑	£47.00	**12034**	Mrs	Audrey	Evans	104 Lincoln Road	Deepin

Note that the number is shown as changed, meaning that the organisation has a different contact person, but the person's details are shown as unchanged. You can if necessary edit the person's details. Again, editing the surname will cause a prompt to check that you really intend to do that, rather than changing the contact person.

If the person is not one of the possibilities shown, click the (new) entry at the top of the list. This will just fill in the surname, leaving you to complete the new person's information

tmail.com	☑	£47.00	**(new)**		Evans

To Add a new Organisation

Go to the bottom of the table, where you will see an empty line with a **+** on the left. Type the organisation's name, email and website (if there is one) into the boxes. As soon as you leave the name box the row is added to the table

-		Membership Orchestra		☑	£47.00

To add the contact person, follow the instructions above for changing the contact person: type their surname into the surname box and choose either an existing person or a new one.

To Remove an Organisation

If an organisation simply fails to renew their subscription, there is no need to do anything at all. If, however, for some reason you want to remove the organisation straight away then click the **x** in the left hand column. This will remove the organisation, but not the contact person.

	Organisation	Email	Web	Cur	Sub SRP	No	Title	First	Surname
↶	~~10096~~	~~Aberdeen Chamber Recorder Orchestra~~	~~Recorder_1@Hotmail.com~~	☐		10164		Ed	Friday

To Save Changes

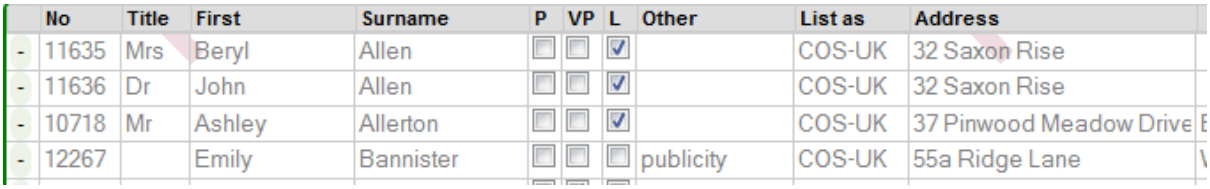
As always, nothing is done to the database until you click **Save**. Then the changes are made and the old and new subscriptions are shown.

Editing Honorary Membership

The honorary membership list has an entry for everyone who:

1. Is a president or vice-president of the Society
2. Is an honorary life member of the Society
3. Qualifies, for some reason other than the above, for free membership of the Society. Such qualification is at the discretion of the Membership Secretary.

The list contains the person's details plus two extra pieces of information:



	No	Title	First	Surname	P	VP	L	Other	List as	Address
-	11635	Mrs	Beryl	Allen	☐	☐	☑		COS-UK	32 Saxon Rise
-	11636	Dr	John	Allen	☐	☐	☑		COS-UK	32 Saxon Rise
-	10718	Mr	Ashley	Allerton	☐	☐	☑		COS-UK	37 Pinwood Meadow Drive
-	12267		Emily	Bannister	☐	☐	☐	publicity	COS-UK	55a Ridge Lane

1. The reason for the person being in the list. If the person is a President, Vice President or Life Member, this is shown as a tick in the **P VP** or **L** box. In the case of discretionary status, an explanation is given in the **Other** field.
2. The **List as** field, which determines where the member's details should appear in the Membership list and their magazine subscription. This will either be blank or it will be one of the COS branches or NYRO. It should be filled in for all members with reason P, VP or L. While the person is a member of a branch, including COS, this field is ignored. If they are not a member of any branch, however, their details will not be shown in the membership list unless this field shows one of the COS branches, in which case their details will appear under that COS branch. Similarly, if this field is blank the person will not automatically receive a magazine; if it filled in then they will receive one, and their branch number in the magazine mailing list will be 50,51, 52 or 61 according to whether the entry is COS UK, COS EU, COS RW or NYRO.

To Add a Person

To make a person an honorary member, add then in the same way that you would add a person to a COS branch, using the row marked + at the bottom of the list. When you have added the person, choose one or more reasons by ticking the **P**, **VP** or **L** box or typing in the **Other** field. If this person should appear in the membership list, regardless of whether they belong to a branch explicitly, then fill in the **List as** field. As you start typing in this field it will show the possible alternatives: choose the one you want. If the person is entitled to a magazine subscription by virtue of some connection with NYRO, fill in NYRO here.

To Remove a Person

You will notice that the button on the left of each entry in this table is marked **–** rather than **x**. To remove a person from the list of honorary members, click this button. You will be prompted to ask whether you want just to remove the honorary status, or to delete the person completely. Choose which you want to do. If you make a mistake, click the ↶ button at the beginning of the line to restore the person.

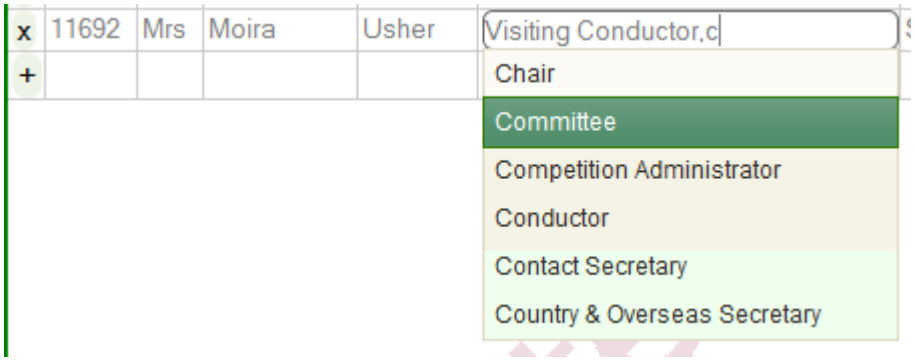
To Save Changes

Click **Save** to make your changes.

Editing SRP Roles

SRP Roles are used to record visiting conductors and officers of the Society. They are edited in a similar way to honorary members, but with just one column, **Role in SRP**. apart from the personal details.

To add a role to someone already on the list, add a comma at the end of the roles and start typing the new role name: a list of matching roles is shown, from which you should click the one you want.



You can add as many roles as you like, and also delete existing roles.

To add a role to a person who does not have any, start typing the person's surname into the Surname field on the last line. If the person is already a member, select them from the list; otherwise select the (new) entry and complete the person's details.

Click **Save** to save your changes.

Editing Role Names

There is a list of allowed role names in the database. Only these names can be used in the branch role box on the spreadsheet. This helps to ensure consistency in the membership list. If a branch needs a genuinely new role, you can add it by choosing **Edit** and **Role Names**.

This shows the existing role names in alphabetical order. Type the new role name in the last row and click **Save** (or click anywhere else to get a new row if you want to add more than one role), Role names can only contain letters, spaces, '-' or '&' , otherwise they will be rejected.

You can also delete an existing role name, if it is not in use, by clicking the **X** at the beginning of the row.

Click **Save** to save your changes.

4. Magazine

A copy of the Recorder Magazine is sent to each active member(two copies to each active organisation). A member automatically becomes active when they join or renew their subscription. A member who does not renew continues to receive the magazine for a time, but at some point each year all members who have not renewed need to be made inactive. There is a button **Update Inactive Members** to do this.

Changes to members' active or inactive status are not sent to Recorder Music Mail immediately. Instead there is a button **Update Subscriptions**. This calculates changes to the magazine subscriptions since they were last updated, and sends them in a spreadsheet to Recorder Music Mail. RMM should update the spreadsheet with their reference for any new entries, and return it to the membership secretary, The returned spreadsheet should be entered using **Accept RMM Updates**.

The magazine tab shows the number of current magazine subscriptions. If there are outstanding updates that have been sent to RMM but not yet acknowledged, it also shows the number of subscriptions according to RMM, and the number of outstanding updates.

Update Inactive Members

You should use this button once a year, shortly before the first magazine issue that should *not* go to members who have not renewed. Clicking the button tells you how many members will be made inactive and you can then go ahead, inspect the list of newly inactive members or cancel the operation. If you choose to inspect the list, then you will have to click the button again and then choose **OK** to carry out the operation. After updating inactive members, you need to **Update Subscriptions** to send the changes to RMM, but you don't have to do that straight away.

Update Subscriptions

This calculates the magazine subscription state for every member and updates a local subscription list. It stores a spreadsheet of changes that affect active subscriptions, and sends a copy to Recorder Music Mail and a copy to the user who requested the update. It reports the number of changes to be sent to RMM and whether or not they were successfully sent.

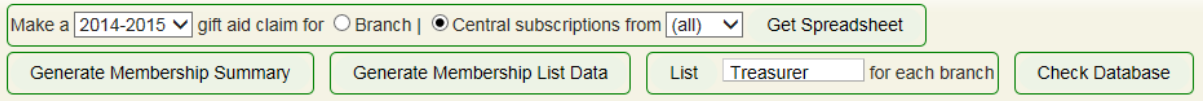
If there are changes but they have not been sent, please contact the web editor to fix the problem.

Accept RMM Updates

When you receive the updated spreadsheet returned from RMM, click **Browse** and open the spreadsheet, This will check that the spreadsheet contains what we are expecting and if all is well, report OK. If an error is reported, you may be able to fix the problem by editing the spreadsheet or by contacting RMM; if not, please contact the web editor.

If you update subscriptions again before you've received the acknowledgement of the first update from RMM, make sure you enter the acknowledgements in the correct order. An acknowledgement will not be accepted if there is an earlier acknowledgement outstanding. Each spreadsheet contains a numeric reference (which also forms part of the spreadsheet name): the reference increases with time, so you can tell which is the later sheet even if they have the same date.

5. Reports


Make a 2014-2015 gift aid claim for Branch | Central subscriptions from (all) Get Spreadsheet
Generate Membership Summary
Generate Membership List Data
List Treasurer for each branch
Check Database

This tab contains sections for

1. Generating **Gift Aid** claims for submission to HMRC
2. Generating **Membership Summary** statistics
3. Generating the data for the **Membership List**
4. **List Treasurer for each branch**
5. **Check Database** to make sure it is consistent and up to date

Gift Aid

To generate a claim for Central SRP subscriptions and donations, click the **Central** radio button and choose **(all)** in the drop down list. Then click **Get Spreadsheet**.

To generate a claim for branch subscriptions for a single branch, click the **Branch** radio button and choose the branch from the drop down box. Then click **Get Spreadsheet**.

To generate claims for branch subscriptions for all branches, click the **Branch** radio button and choose **(all)** in the drop down list. Then click **Get Spreadsheet**. This generates a zip file containing a spreadsheet for each branch that has recorded branch subscriptions eligible for gift aid.

Branch Subscriptions

The spreadsheet is in a text format called csv that can be used with any spreadsheet program. It has an entry for each member who has signed up for gift aid. The entry shows the date and amount of the branch subscription. If you claim gift aid on less than the full amount of the branch subscription, you will of course have to adjust the amount accordingly.

To complete the gift aid schedule for branch subscriptions, follow these steps:

1. If you have not already done so, download the Gift Aid schedule from http://www.hmrc.gov.uk/charitiesschedules/giftaid.htm choosing the correct version for your software – Excell or Libre Office.
2. Open the gift aid schedule and the csv spreadsheet.
   If you are using Open Office, then when you open the csv you should set character set to **Western Europe(Windows-1252/WinLatin1)** and the type of the date column to **Date (DMY)** rather than standard.
3. In the csv, click in cell A1, then shift+click in the final amount cell in the last row to select all the relevant data in the sheet. Copy this to the clipboard, for example with control+C.
4. In the gift aid schedule, click in the first white cell of the Donations Schedule Table (Item 1 Title).
5. Paste formulas:
   a. In Excel 2007 or later, in the Home tab, Clipboard group, click the arrow under **Paste** and choose **Formulas** (**fx** in 2010 or later).
   b. In earlier versions of Excel choose **Edit**, **Paste Special…** and click the **Formulas** radio button and click **OK**.
   c. In Open Office, choose **Edit**, **Paste Special…**. Uncheck **Paste all**, and check **Text**, **Numbers**, **Date & Time** and **Formulae**; uncheck **Comments**, **Formats** and **Objects**, Click **OK**.
6. To find the earliest donation date for Box 1, go back to the csv file and in cell K1 type the formula **=min(H1:H1000)**. This will display the earliest date. Copy this and paste its value into Box 1. (in Open Office you will have to format K1 as date first, or simply type the value into Box 1 by hand).

If you need advice about general gift aid matters, please contact Tessa Rolph, chair@srp.org.uk.

If you need help with the spreadsheet, please contact Anthony Hall, webedit@srp.org.uk.

Central Subscriptions

The spreadsheet for central subscriptions contains more information than the HMRC sheet, so parts need to be selected before copying into the HMRC sheet:

1. There is a header row identifying each column. This should not be included in the HMRC sheet, so when following the instructions above, start at row 2, not row 1.
2. There are separate columns for the SRP subscription and the different classes of donation. Depending on how you want to organise the claim, you can either insert a new column with the sum of the subscription and relevant donations, or copy the sheet to produce separate entries for subscriptions and donations.
3. There is also a column for the branch and a column indicating whether this is a new gift aid entry this year. These can be used for sorting the sheet and checking against other records.

Membership Summary

Generate Membership Summary produces a spreadsheet giving a summary of the number of members in each branch for each year since the database was established.

Membership List

Summary of the Process

1. Edit any text that needs to change from year to year.
2. Download that data from the database
3. Create the document
4. Proofread it and correct any errors in the database or text files.
5. Repeat steps 3 & 4 until you are satisfied that the content is completely correct
6. Remove unwanted information and finalise the formatting
7. Create pdf (or whatever needs to be sent to the printer)

Each of these steps is explained in more detail below. To make sense of the details, though, you need to understand the….

Membership List Structure

The membership list is made up from three different kinds of information

1. Fixed information that doesn't vary from year to year – the logo, title, objectives, document description and so on. This is all stored in the template MembershipTemplate.dotm
2. Variable information that changes from year to year but isn't stored in the database – text about NYRO, advertisements and so on. Each piece of variable information is stored in a text file such as CorporateText.docx (which contains the advertisements from corporate members)
3. Database information – branch and COS lists, orchestras, corporate members and so on

Edit Text

You will need to update the following files each year that the list is produced

OrchestrasText to update the information about NYRO, assuming we still want that there. (Actually the entry for NYRO in the table above is not generated from the database. In fact it's stored in the template for now but probably shouldn't be. I wasn't sure whether that needed to be included in the table at all given that there is also text about NYRO, but if it is I need to think of a better way of including it).

CorporateText needs the current advertisements for each of the corporate members (I assume). We have one more this year.

PostIndexText currently contains the material such as the Bravo Bonsor advertisement that follows the index in the printed document.

OfficersText is the list of SRP Officers that appears on the inside cover.

Download Data

Login to the membership system and on the Reports tab click Generate Membership List Data. This will produce a file called something like SRP14_List_2015-02-01.srp. Save this file to your list folder.

Create Document

In File Explorer, go to your list folder. Double click MembershipListTemplate.dotm. This will open a new Word document with the skeleton information in. You may get a security warning that macros have been disabled – in that case click Options and choose Enable this content.

In the QAT (top left of the window) you should see an icon representing a book. Click this. After a bit a window will appear, asking you to Open the Saved Membership Data. Choose the file you downloaded in the previous step and click Open. Now you will see a window asking you to wait and showing what stage of processing it is up to. When it finishes, click OK. You can check the document there and then, or save it under any name you choose.

Proofread Document

Make sure the document contains the information you would expect, and that individual items (for example phone numbers) are correctly printed – for example that names have upper case letters, phone numbers have the correct structure and spacing. Don't at this stage worry about larger scale formatting issues such as pagination of the tables. However, you may want to edit the text files according to the amount of space you have available between tables where they are to appear.

You may see some red text. This contains the instruction from the Name Only field. Where this simply said "N" or "Y" or "Name only", it has already been done automatically in the branch lists. If, however, it asked for something more complicated then the program simply writes out the instruction in the table. It's highlighted in red (so you notice it) and with "!!" (so you can search for it). If the instruction that is printed out is in fact just to remove everything except the name, then you should change it to "N" in the database, to minimise the amount of work in the next stage. If it is more complicated than that, then don't do anything about it at this stage.

In the orchestras, corporate members and conductors tables, name only instructions are never processed automatically, but always printed out. Leave them alone at this stage.

If there are errors in the database, then correct them. You may want to generate new branch spreadsheets to prevent your changes being overwritten if the branch submits an update between the list being generated and the end of the year.

Make Final Adjustments

Only once all the tables are correct, you may need to make some manual changes to the formatting.

First, remove information where people there are red instructions from Name Only. You need to follow the instruction (for example remove just the email field, or whatever) and delete the instruction itself.

The only other formatting adjustments you ought to need are

1. If a single cell overflows unnecessarily, you may be able to adjust its size to accommodate the text. To adjust a cell on a single line, select the whole cell and drag its left or right boundary.
2. You may want to adjust the page breaks. The program tries to paginate correctly: if a table would have fewer than six members , it will start on a new page, and if it would leave fewer than three members at the top of a new page, it will break earlier to avoid this. (These numbers can of course be changed if you want, if you would prefer different rules) If the result is not satisfactory, then you will probably want to force a table on to a new page. **Do not** try to do this by inserting a page break – the table won't start in the right place if you do. Instead, put the cursor in the space between this table and the preceding one and change the style (which should be separator) to *sepPage*. If for some reason you want to break within a table, then select everything from the row you want to break before to the end of the table, then set the paragraph format to **Keep with Next**.

When you have finished formatting the document, the page numbers in the contents list will probably need to be updated. Select the whole document and press F9 to update them.

Now save the document.

List *Treasurer* for each branch

Clicking **List** produces a spreadsheet of the name, eMail and telephone of each branch treasurer. If you want you can list other branch officials by typing the role name such as *Chair* or *Secretary* instead of *Treasurer*. As you start typing you will see a list of possible roles to choose from.

Check Database

Clicking **Check Database** checks some rules that the database should obey if it is consistent and complete. For each rule it either reports OK or it reports Fail and gives a table, each row of which shows a case where the rule is broken. These reports are primarily intended for the system maintainer, not for users.

The first rules checked are consistency rules that should always hold – any violation is an error in the software. The final rules are completeness rules that only hold once a complete set of membership records and magazine entries has been processed. Violation of these rules might indicate that the some action is needed by the user.

Consistency Rules

PersonOrOrg

There is no confusion in the database between people and organisations.

OrgNotHon

Only people, not organisations, can be honorary members.

XNotHon

Only living people are honorary members

HonActive

If an honorary member has a default branch then they are always active (ie receive the magazine) regardless of branch membership.

SubMatchesPOrgType

The subscription is of the appropriate type for a person or organisation.

SubMatchesHon

If a person's memStatus is L or LH, that person must be an honorary member.

OneRealSub

A member can have only one membership in a given year, not counting associate membership.

NoTentativeWhenReal

This is a purely technical check on the way that associate membership is handled.

hInHousehold

For every member with membership status h there must be a corresponding H or LH member.

HouseholdHasMembers

If a person has an H or LH membership, there must be at least one other person with a corresponding h membership.

HouseholdsDistinct

No two H members in a year have the same address

RolesKnown

All branch and SRP roles are in the list of allowed role names

Completeness Checks

AssociateHasFull

(When all subscriptions for a year complete)

An associate member must have a real subscription to another branch

MagPersonActive

(When magazine up to date)

If a person is active and does not have an h subscription, they has an active magazine subscription to their own address.

MagHouseholdActive

(When magazine up to date)

If any member of a household is active, but the H member is not, there is an active magazine subscription to the address of an active member.

MagOrgActive

(When magazine up to date)

If an organisation is active it has an active magazine subscription to its contact's address.